



SOUTHERN GLAZER'S WINE AND SPIRITS  
313 Underhill Blvd.  
Syosset, NY 11797

Bus: 516.730.3677

**John Wilkinson**  
Warehouse Director

# Memo

To: Maria Suarez  
From: John Wilkinson  
CC: Elizabeth Toohig  
Date: January 11, 2017  
Subject: Performance Improvement Plan

---

This memo serves as a follow up to our conversation on December 16, 2016. As we discussed during that meeting, you are being placed on a Written Warning for overall performance deficiencies. In addition, we reviewed the expectations of your position, as well as specific areas in which you are not meeting expectations.

In an effort to assist in your success, you are being placed on a 90 - day performance improvement plan. During the next 90 days, we will meet weekly, on Tuesday's, beginning on January 24, 2017, to review your progress and discuss continued areas of opportunity. These meetings will take place in my office at 9:30 am, after the cycle counters have been assigned their tasks. It is anticipated that you will be fully prepared to discuss your successes and challenges from the previous week. At the conclusion of each meeting we will have an agreed upon action plan for the following week that will be confirmed in email.

## Completing Tasks

As the WMI Administrator there are essential tasks that you must complete on a daily basis. These were reviewed and agreed to during our meeting on September 2<sup>nd</sup>, and are:

- Stock locator report: Ensures all products are in a location that is assigned the correct status.
- Pick/Pack: Ensure that all invoices are picked, packed and shipped when complete. Complete or cancel all items after consulting with the appropriate individuals (Inventory Control Manager, Warehouse Manager, and/or Operations Analyst).
- Cycle Count: Ensure that all counts are reconciled and current. Complete or cancel all items each day after researching each discrepancy.

- ZY: Fix all items that appear on the report.

The following points of completion need to be completed every-other-day. These, too, were reviewed and agreed upon during our meeting on September 2<sup>nd</sup>. :

- Receiving: Ensure all PO's and transfer invoices are closed when complete. Ensure all return invoices are closed when complete. Complete or cancel all items after consulting with the appropriate individuals (Inventory Control Manager, Warehouse Manager, and/or Operations Analyst).
- Task Management: Ensure that all tasks are completed correctly. Complete or cancel all items after consulting with the appropriate individuals. (Inventory Control Manager, Warehouse Manager, and/or Operations Analyst).
- Wave Management: ensure that all waves are in the correct status. Complete or cancel all items after consulting with the appropriate individuals. (Inventory Control Manager, Warehouse Manager, and/or Operations Analyst).

At the end of every day if there is a legitimate business reason why these tasks cannot be finalized a call needs to be had with myself and the Inventory Control Manager. In addition, you should create a daily checklist to ensure that all responsibilities are completed daily. Please submit a proposal for the daily checklist by December 30, 2016.

- Discrepancies during cycle counting are not to be adjusted until every location where there is inventory has been counted. **Reminder:** Any adjustment over 20 cases or valued over \$500.00 must be communicated to all of Inventory Control prior to the adjustment. This needs to happen in real time, as discrepancies are identified, and not at the end of the day.

### **Communication:**

As the WMI Administrator, you are required to interact with several other departments and constant, clear, and professional communication is integral to the success of the organization. You are expected to communicate with co-workers any information that will affect their duties in the inventory control processes. This may include, but is not limited to: replying to emails, returning voice mails, sending out email notifications on inventory issues and holding meetings with cycle counters. You must immediately notify me of any obstacles that will prevent you from successfully completing all tasks. Absent you notifying me of any obstacles, the expectation will be that all tasks are completed accurately and efficiently each and every day.

- All inventory discrepancies need to be emailed immediately, and cannot wait until the end of the day. These emails need to be sent to the Inventory Control Manager, Warehouse Manager, Warehouse Director and Operations Analyst.
- You must respond to all email inquiries by the end of each business day. If unable to resolve a specific issue the same day, an email needs to be sent acknowledging receipt and an anticipated time frame for completion needs to be included in that emailed response.

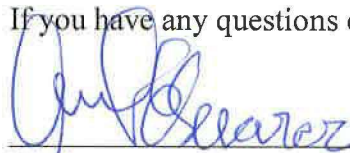
### **Responsibilities:**

- As the WMI Administrator you are responsible for assigning work to all cycle counters. It is also your responsibility to manage the performance of the cycle counter team members and address any concerns immediately. The Day Shift Warehouse Manager must be made aware of all performance related concerns.
- It is imperative that you spend a minimum of 2 – 3 hours per day on the floor conducting research on inventory discrepancies prior to making adjustments. Additionally, you are to ensure that Cycle Counters spend no more than 1 hour at a desk. To oversee the cycle counting process you will be moved from the blue room to the cycle counter office.
- Effective immediately you are required to work from 8:30 am to 6:30 pm until the inventory issues have been resolved. All management employees are expected to work at minimum of 1 full shift when there is weekend work available. As the WMI administrator your presence is required if OT has been approved for cycle counting.

Maria, as your manager, I will support you with this plan; however, the greatest share of the responsibility lies with you. I encourage you to use this plan as an opportunity to improve in the areas noted above. Your attention to detail to ensure accuracy in your work product is of utmost importance.

Please understand that failure to show immediate, significant and sustained improvement in in your overall performance will lead to additional action, up to and including termination of your employment.

If you have any questions or concerns as to what is expected of you, let me know immediately.

  
Maria Suarez (Date) 1/18/2017

  
John Wilkinson (Date)